

# SIP DYNAMIC TOP-UP FORM

## 1 APPLICANT'S PERSONAL DETAILS (MANDATORY)

Folio no. (For Existing Unit holders)

Sole / 1st Unitholder  First Name  Middle Name  Last Name

1<sup>st</sup> holder PAN  1st Applicant  2<sup>nd</sup> holder PAN  2nd Applicant  3<sup>rd</sup> holder PAN  3rd Applicant

## 2 EXISTING SIP DETAILS

Scheme name

Plan  Option

SIP amount (figures) ₹  (words)

SIP date (DD)   SIP start date (MMYY)     SIP end date (MMYY)

## 3 SIP DYNAMIC TOP-UP DETAILS

Top-Up amount (figures) ₹  (words)

From date (MMYY)

## 4 DECLARATION AND SIGNATURE (To be signed by ALL UNIT HOLDERS if mode of holding is 'joint')

I / We declare that the particulars furnished here are correct. I / We authorize Axis Mutual Fund acting through its service providers to debit my / our bank account towards payment of SIP instalments through an Electronic Debit arrangement / NACH (National Automated Clearing House). If the transaction is delayed or not effected at all for reasons of incomplete or incorrect information, I/we would not hold the user institution responsible. I/We will also inform Axis Mutual Fund about any changes in my bank account. This is to inform you that I/We have registered for making payment towards my investments in AXISMF by debit to my /our account directly or through ECS (Debit Clearing) / NACH (National Automated Clearing House). I/We hereby authorize to honour such payments and have signed and endorsed the Mandate Form. Further, I authorize my representative (the bearer of this request) to get the above Mandate verified. Mandate verification charges, if any, may be charged to my/our account. I also hereby agree to read the respective SID and SAI of the mutual fund before investing in any scheme of Axis Mutual Fund using this facility.

X Sole / 1st Unit Holder / POA

X 2nd Unit Holder

X 3rd Unit Holder

## ACKNOWLEDGMENT SLIP (To be filled by the investor)

Folio No.  Investor Name

Scheme Name

Top-up Amount (₹)  SIP start date

Stamp & Signature

## INSTRUCTIONS

- The Application Form should be completed in ENGLISH and in BLOCK LETTERS only.
- Please fill this form, only if you have opted for Dynamic Top-Up at the time of SIP registration.
- A minimum gap of 21 days and maximum of 90 days needs to be maintained between dates of Application & SIP due date.
- Existing unit holders should note that unit holders' details and mode of holding (single, jointly, anyone or survivor) will not change.
- The date for Axis Mutual Fund TOP-UP Facility will correspond to the registered SIP.
- Top-Up application can be made only after 3 months from Top-up SIP registration date.
- Minimum gap between two top up requests should be 3 months.
- The minimum amount for Axis TOP-UP facility is ₹ 500/- and in multiples of ₹ 1/- for all schemes; except Axis Long Term Equity Fund the minimum amount is ₹ 500 and in multiples of ₹ 500 thereafter.
- If no amount is mentioned as TOP-UP amount, minimum TOP-UP amount would be considered, i.e., ₹ 500/- for all schemes.
- Amount specified in last request shall be continued till the End of the SIP tenure.
- The SIP will be discontinued automatically if payment is not received for three successive installments.
- Investors can discontinue a SIP at any time by sending a written request to any Official Point of Acceptance or to the registrar Karvy. Notice of such discontinuance should be received at least 20 days prior to the due date of the next installment / debit.
- In case an investor wishes to change the bank account details for the existing SIP registered through NACH Debit mode, then he has to provide a cancellation for the existing SIP Mandate and register fresh SIP with the new bank details.
- Existing ARN / EUIN given at SIP registration will continue post Top-up for the SIP tenure; unless & until investor requests for the change of distributor.
- Top-Up Facility is available Axis Children's Gift Fund. However, a separate form for the scheme is available on the website.
- Top-Up facility is not available for Axis Liquid Fund, Gold ETF and NFO.
- Axis Mutual Fund, its registrars and other service providers shall not be held responsible or will not be liable for any damages and will not compensate for any loss, damage etc. incurred to the investor. The investor assumes the entire risk of using this facility and takes full responsibility. Investor will not hold Axis Mutual Fund, its registrars and other service providers responsible if the transaction is delayed or not effected or the investor bank account is debited in advance or after the specific SIP date due to various clearing cycles of NACH Debit/ECS / local holidays.
- Axis Mutual Fund reserves the right to reject any application without assigning any reason thereof. Axis Mutual Fund in consultation with Trustees reserves the right to withdraw these offerings, modify the procedure, frequency, dates, load structure in accordance with the SEBI Regulations and any such change will be applicable only to units transacted pursuant to such change on a prospective basis.